

ESTATE PLANNING PERSONAL INFORMATION

Name: _____

Address: _____

Telephone #s: _____

Social Security Number: _____

Date of Birth: _____

CHILDREN: List the name(s) and birth dates.

GIFTS:

Are there any gifts of specific property (e.g., family heirlooms, jewelry, etc.) or cash that you would like to go to any specific individual(s) or organization(s), including charitable bequests?

Gift

To Whom

REPRESENTATIVES UNDER THE WILL:

Guardian for minor children: _____

Trustee for minor children: _____

(Guardian and Trustee may be the same person)

Executor: _____

(May be an individual or a trust company)

Successor Executor(s): _____

POWERS OF ATTORNEY:

Agent for Power of Attorney for Health Care: _____

Successor agent(s): _____

Agent for Power of Attorney for Property: _____

Successor agent(s): _____

LIVING WILL:

Is a living will desired? _____ Yes _____ No

ESTATE PLANNING FINANCIAL INFORMATION

(attach separate sheet if necessary)

BANK ACCOUNTS:

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

CERTIFICATES OF DEPOSIT:

_____	\$ _____
_____	\$ _____

STOCKS:

_____	\$ _____
_____	\$ _____

INDIVIDUAL RETIREMENT ACCOUNTS:

_____	\$ _____
_____	\$ _____

LIFE INSURANCE:

_____	\$ _____
_____	\$ _____

REAL ESTATE:

_____	\$ _____
_____	\$ _____
_____	\$ _____

AUTOMOBILES:

_____	\$ _____
_____	\$ _____

OTHER ASSETS:

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

REAL ESTATE MORTGAGES:

_____	\$ _____
_____	\$ _____

Dated: _____

Client _____